

TaxAct Gives American Taxpayers the System That Beats the System

With new and improved tools and insider knowledge, TaxAct 2016 products help Americans beat the system and take control of their financial lives -- starting with their taxes

CEDAR RAPIDS, IA -- (Marketwired) -- 01/09/17 -- TaxAct today announced its 2016 products are now available to help Americans prepare and file their taxes easily, accurately and for a fraction of the cost of other major do-it-yourself (DIY) tax software products. The leading provider of affordable digital and download tax preparation solutions, TaxAct empowers savvy do-it-yourselfers to find smart tax advantages for the best possible tax outcome. A wide array of taxpayers, ranging from those with simple returns to the millions of gig economy income-earners with more complex tax situations, will find a DIY tax product to fit their needs with [TaxAct 2016 Free](#), [Plus](#) or [Premium](#). Plus, TaxAct expects to introduce a new product for the 2017 tax season, BluPrint™ Financial Assessment, which will give customers the option to receive financial guidance, information and savings all year round, not just on tax day.

[TaxAct](#) is helping its customers take control of their hard-earned money starting with the clearest picture of their current financial state: their tax return. This tax season, interested customers can receive a complimentary BluPrint report containing an analysis of their return. BluPrint presents the filer with financial insight and opportunities to reduce their tax bill next year and save for their future. The all-new BluPrint Financial Assessment is a first of its kind offering from a tax preparation software provider.

"Empowering our customers to make smart tax and financial decisions -- without charging inordinate fees -- is one way we can help them take control of their financial health," said Rob Gettemy, chief operating officer of TaxAct. "As part of our philosophy to offer support beyond tax preparation, customers will gain the benefit of year-round financial savings with BluPrint. This is the first of many tools we expect to launch this season and in the upcoming year to help Americans chart their financial course."

TaxAct: The System to Beat the System™

The value-leader in DIY tax preparation solutions, TaxAct continues its tradition of helping taxpayers file their own returns for less. Even filers with the most complicated tax situations will pay nearly 70 percent less* with TaxAct Plus and Premium Federal Editions than they would with TurboTax this tax season. Not only is TaxAct more affordable, the company is committed to transparency, making it clear what a customer will pay to file their return -- up front.

"Our industry has become a system built around deceptive practices -- luring consumers in with promises of free filing, only to charge higher, unclear prices when it's time to e-file," Gettemy said. "TaxAct is [the system to beat the system](#). We're putting an end to such bait and switch tactics while continuing to offer the sophisticated tools and smart in-product tax tips and strategies filers need to find their biggest tax savings."

Price Lock Guarantee Puts an End to Bait and Switch

TaxAct's Price Lock Guarantee is a prime example of the company's commitment not to play "bait and switch." Customers using any online TaxAct product always pay the price listed for that product at the time they started their return, no matter when they file. In many cases, filers begin a return but elect to file at a later date. TaxAct eliminates the possibility of an increase by holding the price offered for the online product selected at registration for the entire season. Many other tax service providers impose steep price increases throughout the season, forcing filers to pay more if they've started but not completed their return.

TaxAct also continues to provide its long-standing Maximum Refund Pledge as well as its Accuracy and Satisfaction Guarantees.

New features for the 2017 filing season

Updated with the final IRS forms and tax laws, TaxAct 2016 products include the features, forms and schedules filers need to prepare their return this tax season. Enhancements include:

- 1 ***Expanded W2 import options*** -- Filers save time and improve accuracy by automatically importing salary information

directly from their employer straight into their TaxAct return. TaxAct can now import Forms W-2 for more than 75 million Americans. In addition, TaxAct Online customers can import a portable document format (PDF) file of their W-2.

- 1 **Completely redesigned mobile app** -- With a streamlined user experience, TaxAct Express™ makes it easy for filers to prepare simple returns using their mobile phone or tablet. In addition, filers can use their mobile device to take a photograph of their W2 and upload it directly into their return, saving time and minimizing data entry errors.
- 1 **Personalized income interview** -- A new streamlined interview based on income earned throughout the year helps TaxAct DIY filers prepare returns faster and easier.
- 1 **Unlimited Support** -- Filers can contact TaxAct's team of trained tax professionals via phone or email for tax and technical help at no additional charge, no matter which TaxAct product they use. Free phone support also applies for TaxAct Online Free Edition customers -- an added value not included in the leading competitor's free product.
- 1 **Prior-year online return access** -- TaxAct Online customers, including those eligible to file simple federal (1040EZ/A) and state returns for free, can review and print their TaxAct 2016 return for seven years after filing, for no charge. This is yet another feature for which the leading competitor requires their 'free' filers to upgrade to a paid product.

**Prices subject to change. Pricing references apply to federal income tax returns only.*

About TaxAct

TaxAct is a leading provider of affordable digital and download tax software for individuals, business owners and tax professionals. The company's mission is to empower people to navigate the complexities of tax and finance with ease and accuracy -- at a clear, transparent and fair price. As evidence of its commitment to transparent pricing, TaxAct has long offered a Price Lock Guarantee that ensures its customers pay the price listed for their selected online product at the time they started their return, no matter when they file. TaxAct was one of the top three visited online tax preparation destinations last tax season¹ and has assisted with approximately 65 million e-filed federal returns since 2000. To learn more about TaxAct, a business of Blucora, Inc. (NASDAQ: BCOR), visit www.TaxAct.com or connect with us on [Facebook](#), [LinkedIn](#) and [Twitter](#).

¹ According to collective week end reports for taxact.com released by SimilarWeb Ltd.

Forward-Looking Statements

This release contains forward-looking statements within the meaning of Section 27A of the Securities Act of 1933 and Section 21E of the Securities Exchange Act of 1934. Actual results may differ significantly from those projected. The words "believe," "expect," "intend," "anticipate," variations of such words, and similar expressions identify forward-looking statements, but their absence does not mean that the statement is not forward looking. These statements are not guarantees of future performance and are subject to certain risks, uncertainties and assumptions that are difficult to predict. Factors that could affect Blucora's actual results include the successful execution of the Company's strategic initiatives, operating plans, and marketing strategies, general economic, industry and market sector conditions, the progress and costs of the development of our products and services, the timing of launch of our products, including BluPrint™ Financial Assessment, the timing and extent of market acceptance of those products and services, and our dependence on companies to distribute our products and services. A more detailed description of certain factors that could affect actual results include, but are not limited to, those discussed in Blucora's most recent Annual Report on Form 10-K and quarterly reports on form 10-Q as filed from time to time, in the section entitled "Risk Factors." Readers are cautioned not to place undue reliance on these forward-looking statements, which speak only as of the date of this release. Blucora undertakes no obligation to update publicly any forward-looking statements to reflect new information, events or circumstances after the date of this release or to reflect the occurrence of unanticipated events.

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Source: TaxAct

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